



Montana Public Employee Retirement Administration
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<http://mpera.mt.gov>

**PUBLIC EMPLOYEES' RETIREMENT SYSTEM (PERS)
MEMBERSHIP CARD / DESIGNATION OF BENEFICIARY**

Check all that apply: ☐ New Hire ☐ Other (specify job title) _____ ☐ Change beneficiaries

MEMBER INFORMATION					
Last Name		First Name, MI		Social Security Number*	
Date of Birth / /		Gender <input type="checkbox"/> M <input type="checkbox"/> F		Employing Agency	
Member's Mailing Address		Employer Number (MPERA use only)			
City		State		Zip Code	
Daytime Phone Number ()		Email Address			
PRIMARY AND/OR CONTINGENT BENEFICIARY DESIGNATION					
Completion of this section revokes all prior beneficiary designations unless you are prohibited from changing your beneficiary by a valid temporary restraining order issued pursuant to § 40-4-121, MCA. You may designate one or more primary or contingent beneficiaries by using a separate line for each person. Contingent beneficiaries receive benefits only if all listed primary beneficiaries are deceased. If you list two or more primary (or two or more contingent beneficiaries) they will be treated on a share and share alike basis. If you prefer a different allocation, please specify. If you designate a trust (for the benefit of a natural living person only), a charitable organization or your estate as a primary or contingent beneficiary, you will also need to complete the "Other designation" section.					
Primary Beneficiary - attach additional list if necessary.					
Full Name	Gender	Relationship	Birth Date	SSN*	Allocation
	<input type="checkbox"/> M <input type="checkbox"/> F				%
	<input type="checkbox"/> M <input type="checkbox"/> F				%
	<input type="checkbox"/> M <input type="checkbox"/> F				%
Contingent Beneficiary (optional) - attach additional list if necessary.					
Full Name	Gender	Relationship	Birth Date	SSN*	Allocation
	<input type="checkbox"/> M <input type="checkbox"/> F				%
	<input type="checkbox"/> M <input type="checkbox"/> F				%
	<input type="checkbox"/> M <input type="checkbox"/> F				%
Other Designation (NOTE: Any designated trust must already be in existence—this form cannot create a trust.)					
Name of Trust, Charity or Estate		Trustee/Contact Name		Address	
REQUIRED SIGNATURES					
Member Signature				Date	
Witness Name printed (not a beneficiary)		Witness Signature		Date	

**Original signatures are required. MPERA cannot accept faxed or photocopies of this form.
This form must be filed with MPERA before any changes will take effect.**